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Agenda BOSTON, MA
Monday, 26 September 2011, 3:30 p.m.
Archives Center, 201 Rivermoor Street, West Roxbury

- I. Call to order
- II. Approval of Minutes
- III. Report of Chair
- IV. Report of Deputy Archivist
- V. Discussion
- VI. New Business
 - Archives Staff Classification



CITY OF BOSTON
Archives & Records Management Advisory Commission

Minutes

Friday, January 28, 2011, 3:35 p.m.
City Hall—Curley Conference Room, 5th Floor

Members Present: Rosaria Salerno (City Clerk), Jeanette Bastian (Public), Bill Sinnott (Law), Susan Glover (Boston Public Library), James O'Toole (Public), Bill Fowler (Public),

Others Present: Deputy Archivist John McColgan, Asst. Archivist Dave Nathan, Charles Childress (Boston Public Schools), John Houton (Law), Patrick Collins (Dept. of Innovation & Technology), Jim Cyphers (Neighborhood Development), Dean Huggins (Boston Redevelopment Authority)

Call to order.

Rosaria Salerno: Welcomed Commission members and guests, and expressed her appreciation for Jim O'Toole's capable chairing of meetings when she was absent. She also reminded the public members, James O'Toole, Bill Fowler, and Jeannette Bastian, that their terms of appointment have expired and requested them to promptly let her know if they wish to continue as members.

Acceptance of Previous Minutes: The minutes for September 20 were reviewed and accepted.

Deputy Archivist Quarterly Report: Salerno then introduced Deputy Archivist John McColgan to report on current activities of the program (see attachments.)

- The National Historical Publications & Records Commission (NHPRC) notified us that it had approved a reduced version of our grant application to consolidate and preserve records of City agencies. The grant of \$91,604. covers direct costs beginning July 1 of project supplies and services to survey and transfer significant agency materials.
- Archives: McColgan reported on significant accessions, field surveys at various agency sites, Web Site Development, Ongoing Processing of accessions, and use of volunteers
- Records Management activities have focused on 1) training of agency staff regarding City E-mail policy and the development of file plans, and 2) collaboration with DoIT on systems for managing electronic records through managed folders and content management applications.
- At the last meeting Commission members asked Archives staff to explore relying less on

outside grant funding and more on developing a systematic program for acquiring necessary resources. In response McColgan presented a framework for Program Development Planning

Questions & Answers

- Q: In the past Public Health burial permits were housed in the Court St. annex. Did those come to the Archives?
- A: None that we're aware of, though we have received several such transfers directly from the Public Health Commission.
- Q: How often are public records requests for E-mail, and what is the process followed?
- A: About once a month; the Law Dept. gives requesters an advance estimate of the price including investigation and duplication. Large requesters have gotten quite savvy and use a targeted approach for their requests.
- Q: What's the targeted approach?
- A: The users tend to be the media and they make very narrow searches by office and time period
- Q: What's the time frame for completing agency trainings?
- A: Fourteen agencies so far have attended the trainings. We will have a planning session the week of the 31st for the largest agency, the BPS. We will also be contacting agencies who have had trainings but have not yet appointed Department Records Officers.
- Q: What records-related discussion occurred at the City & Town Counsels' Assn. meeting that John McColgan attended?
- A: A representative from the Mass. Supervisor of Public Records briefed attendees on a new state municipal records schedule, the FOIA request process, and on handling E-mail records that have had public and private content commingled.
- Q: Jim Cyphers said he is drafting a Neighborhood Development file plan and is weighing the pros and cons of maintaining multiple retention times for grant records based on funding source, or collapsing them to encompass all.
- A: Archives will consult with him regarding an appropriate approach
- Q: Regarding program development planning, perhaps a consultant could help the Archives in this regard?
- A: There may be a possibility of funding for this from the state's NHPRC re-grant program, and we will look into it.

Salerno moved that, if there were no other observations, that the meeting be adjourned; it was seconded and passed. Meeting adjourned at 4:32 pm.

Documents & Exhibits

- Agenda
- Deputy Archivist's Report
- Minutes of Previous Meeting



CITY OF BOSTON
Archives & Records Management Advisory Commission

Minutes
Monday, May 9, 2011, 3:30 p.m.
City Hall—Curley Conference Room, 5th Floor

Members Present: Rosaria Salerno (City Clerk), Jeanette Bastian (Public), John Houton (Law), James O'Toole (Public), Christopher Cook (Arts & Tourism)

Others Present: Deputy Archivist John McColgan, Asst. Archivist Dave Nathan, Asst. Archivist Kristen Swett, Asst. Archivist Zachary Enright, Charles Childress (Boston Public Schools), Alissa Ocasio (Boston Public Schools), John Houton (Law), Jim Cyphers (Neighborhood Development)

Swearing in of Appointed Members: Since the three Public members had indicated their willingness to serve new terms, those in attendance, Jeannette Bastian and James O'Toole, were sworn in and registered.

Call to order.

Rosaria Salerno: Welcomed Commission members and guests, noted that, due to a lack of quorum, no votes would be taken, and expressed her appreciation at the continuing collaboration between the Archives Division and City agency stakeholders on records management projects; in particular, the assistance offered in developing a new City Contract Documents Management System.

Acceptance of Previous Minutes: Due to lack of a quorum, commission members deferred approval of the minutes for January 28.

Deputy Archivist Quarterly Report: Rosaria then introduced Deputy Archivist John McColgan to report on current activities of the program. John McColgan highlighted the following from the attached Quarterly Report:

- Facilities Upgrade: In the past month the Archives was able to replace most of its office furniture, most of which dated from 1990 or before.
- NHPRC Project: The formal award of the agency survey grant has been delayed pending the outcome of the federal budget debate; nevertheless, planning and recruitment is going forward with the expectation that the project will begin on July 1.
- Reference:
 - Q: Is there a reason for a reference use decline? A: The staff believes this is a

cyclical annual phenomenon and that end-of-year statistics will bear this out.

- Accessions: Significant accessions in the past four months were received from Parks, Graphic Services, and Veterans Services Departments. Also, The City Clerk now transfers all City Council records at the five year mark.
 - Q: What is the size of the Mayor Flynn group? A: Over 100 cubic feet.
 - Q: Are accessions now happening automatically per schedule? A: No, transfers still usually result from ad hoc consultations that are agent-driven based usually on space needs. This process will become more systematic once the accession grant project is completed and agency staff begin implementing file plans. Jim Cyphers, DND records manager, also mentioned that, for many agencies such as his, costs of records transport become an obstacle since records disposition was not budgeted.
- Website: Three hundred Boston Public Schools schoolhouse images now available via the FLICKR Web site.
- Records Management Training: Archives in collaboration with Law and DoIT, have trained DROs for 14 of 60 agencies. Archives also plans to adapt a video presentation developed by BPS to train all City E-mail users in managing their E-mail (a demonstration of the prototype was viewed.)
- Records Management Technology: The Archives and DoIT are finalizing an E-mail filing system to work in conjunction with DoIT's ECM application, Enterprise Vault.
 - Q: Any limits on E-mail storage? A: Not in the short term; however, the proposed filing system is meant to allow for phased destruction which takes capacity pressure off the central servers.
- Future
 - Goal is to provide systematic procedures for entire City
 - To Do: Complete training of DROs, train remotely all computer users, work with senior management to develop and implement file plans

Salerno and members, having agreed that there were no other observations, adjourned the informal meeting at 4:30pm. The next meeting will be held in September at a date to be determined.

Documents & Exhibits

- Agenda
- Deputy Archivist's Report



CITY OF BOSTON
Archives & Records Advisory Commission

Deputy Archivist's Report on Archives & Records Management Division Activity
Since 09 May 2011
For Meeting, Monday, 26 September 2011, 3:30 p.m.

NHPRC Project

As previously reported NHPRC has awarded the Archives \$91,604 for a project to "Consolidate and Preserve the Archival Records of the City of Boston". NHPRC Executive Director Kathleen Williams officially notified the Archives of the award in a letter dated 24 June 2011.

The Division will use these funds to support a project archivist for one year and the supplies and relocation services needed to transfer from the departments and shelve at Rivermoor an estimated 3,000 equivalent cubic feet of hard copy archival records. In addition to transferring legacy collections from departments, the project will establish protocols for the annual systematic transfer of archives; transfer City archival records from the Boston Public Library deposited for safekeeping by the City several years back; and identify electronic archival records series and assess their preservation needs.

Project start-up and the search for a project archivist have been delayed due to the recent departure of one of the Assistant Archivists and the need to recruit for his replacement.

Staff Recruitment

Due to the departure earlier this month of staff Assistant Archivist Zachary Enright, a recruitment effort is under way for his replacement. The job posting, open for two weeks, has drawn 123 applications, of whom forty appear to meet the minimum qualifications. Interviews have begun and a selection is expected to be made in October.

Position Reclassification

To ensure job grades appropriately reflect the professional expertise needed to successfully accomplish the work of the program, the City Clerk plans to request the City to reclassify the Division's professional positions. (See accompanying document, "Reclassification Memo".)

Reference

(Statistical report will be provided at Commission meeting.)

Accessions

- Parks Department Cemetery Division records, approx. 121 cu. ft.
- ISD building plans microfilm masters, 2009-2011, 37 reels and address log
- From BPL: City building contracts; dis-bound City Documents; School Building Department files, 50 cu. ft.
- Public Health Commission burial permits, 2007-2009, 6 cu. ft.
- BPS Hyde Park High: Year Books, 1924-2000; photos, *Courier Magazine*, 1923-72; newsletters, 1988-2002; the *Voice*, 1976-77; graduation programs; publications, 12 cu. ft.
- From BPL: Statistics Department Monthly Bulletin, 1899, 1900, 1906-08, 1913, .5 cu. ft.
- City Council via Paul Walkowski (former City Council aide): Report to Boston City Council 2008 (updated 2011) regarding judicial erosion of the City Council's statutory powers, and review of and research on the impact of the State's Open Meeting Law on the State Constitution's Speech and Debate clause, .2 cu. ft.
- Gift from private donor: Mechanic Arts High School: The Artisan, six editions from 1913-14, 1923, 1934; photo of 1938 baseball team, .2 cu. ft.
- Gift from private donor: Mayor Mansfield campaign button, 1930s.

Records Management – Records Disposal

Authorized destruction of obsolete City records since May amounts to 533 cubic feet:

DND	229
BRA	191
ISD	48
PWD	33
LAW	27
DoIT	15

It is noteworthy that the departments with three-digit figures have records managers on staff. Taken City-wide, these numbers are small when compared with the volume of obsolete records retained by departments. This is reflective of the need for expanding awareness of records management policy and for the adoption of systematic disposition practices.

Records Management – Email Management Training and Technology

Collaboration between the Archives and DoIT has produced a plan and project for implementing technology that will facilitate user compliance with the City's Email Management and Retention Policy. Under the plan DoIT will install Enterprise Vault "retention folders" in all user accounts. Users will be required to transfer all official public records into one of four retention folders:

- Active
- Archive 3 Years
- Archive 7 Years – Closed Files
- Archive Permanent

Enterprise Vault will preserve the emails and their metadata for the appropriate length of time. It will delete emails in the three year folder four years from the date of the message (to ensure retention three years from the end of the current fiscal year). It will delete emails in the seven year folder seven years from the date records are transferred to it from the Active folder (i.e. at

project/case closure). All non-record email may be deleted by the user (assuming no relevant legal action pending) or left in the Inbox or Sent folders where they will be automatically deleted after ninety days. The system will be phased in for most City departments over the course of a year. This will begin with DoIT in October, extend to senior management in November and to all users in February or March.

In conjunction with this project the Archives is working with the DoIT training unit to develop a tutorial for this system. The tutorial will be available both for in-person group training and ongoing as an online ready-access help tool for users.

Records Management – Suggested Policy Amendment Prohibiting Personal Email Accounts

With the increasing use of personal email accounts, there are reported instances of employees using these accounts (e.g. Yahoo & Gmail) for City business. Since this practice effectively renders public records out of official custody, and thus violates public records statutes, the Commission may wish to insert a specific prohibition into the Email Management and Retention Policy. Amending language to this effect (as well as minor edits changing the term “long-term records” to the more accurate “public records”) is incorporated into the attached amended policy draft for the Commission’s consideration.

Records Management – Social Media Policy

The Archives has contributed the Public Records Section to the City’s overall policy on Social Media. (See attached.)

Records Management – Department File Plans

Promoting department-specific file plans requires a fresh approach that elicits department head commitment to records management and to directing DROs to become invested in file plan development and implementation. The Archives will aim to shape the email project as a catalyst in drawing departments’ attention to this departmental responsibility.

With assistance from DoIT the Archives is exploring a database methodology to facilitate the production of department file plans. This is conceived as a communication and data-gathering tool enabling the Archives to work via computer directly with Department Record Officers in the construction of their retention file plans.

General Summary

The City Archives continues to pursue its goals of acquiring, preserving, documenting and making available all the City’s archives and creating systematic procedures for the retention and disposition of all City records. The new NHPRC project and the hiring of new professional staff will commence a new phase in which acquisition and processing will significantly expand and departments will commence systematic archival transfers as standard operating procedures. In the pursuit of records management the Archives participates in a joint effort with DoIT and Corporation Counsel to develop technology and training initiatives for the implementation of policy that will achieve City-wide operational efficiencies and legal compliance. Strategy will focus on obtaining department head cooperation, which is critical to the ultimate success of the Archives’ mission.

MEMORANDUM

Reclassification of Archives Staff

"Archival work is too important, complex, and demanding to be handled satisfactorily by people who lack professional training and experience. In that sense, it is comparable to familiar professions such as teaching, medicine, and the law. Like these professionals, archivists possess highly developed skills based on education, experience, and a rich body of theory and practice. They are adept at asset management, communication, resource allocation, marketing. They are versatile, applying their professional skills and insights in changing and challenging settings. Hiring a professional archivist is a sound investment for the parent institution. It is a cost-effective way of managing an irreplaceable information resource in historical records for either or both internal and external clients. Professional archivists are fundamental to business, government, and education, indeed, to all segments of society..."

*Bruce Dearstyne, author, professor, and consultant
in records, archives, and related information work*

Intro

The City of Boston is committed to professional staffing for the management of its archives by virtue of State statute chapter 68, acts of 1988. This law establishes the Archives and Records Management Division in the office of City Clerk and specifically states that "said division shall be supervised by a professional archivist...". The law further enables the City Clerk to "employ within said division professional and technical experts and such other employees as may be required in the performance of its duties...".

To ensure that the mission of the City Archives is carried out with the utmost professionalism the Division sets a high standard of qualification in recruitment for professional archivist staff positions. This standard materially exceeds that reflected in the classifications with which the City currently grades the division's positions. This memo states the argument for upward reclassification of City Archives staff.

City Archives Mission

The mission of the City Archives is to provide a government service that ensures the comprehensive and systematic management of all Boston's municipal archives and records. The City Archives develops City-wide policy for the management and disposition of all the municipal government records of Boston and assists agencies in the implementation of these policies. It preserves the City's archival records by means of facilities, programs and procedures for physical accommodation, security, environmental control and document conservation. It makes the City's archives accessible to departments and the public by means of document finding aids, reference procedures and the promotion of public use, and ensures ready access to essential evidence documenting the rights of citizens, the actions of municipal officials and Boston's historical municipal experience.

History and Program

Although approaching its fifth century Boston has had a formal archives and records program only since 1988. In that year a federally funded study revealed widespread neglect and

endangerment of City records. It led to swift passage of remedial legislation creating both the City's Archives and Records Advisory Commission and a new division of the City Clerk's office charged with developing the archives program. In 1989 the City hired staff and utilized a closed school in Readville as an interim repository. In 1995 a new City Clerk arrested a period of program attrition by filling positions with professional staff and increasing the budget for supplies, equipment and contract services. A new Deputy Archivist (the Archivist's position has been vacant since 1993) introduced initiatives for cataloging, outreach, conservation, intern and volunteer projects, reference services, and records management for the benefit of City departments. A notable achievement was the rescue and preservation of an estimated eleven million student records of closed schools. Records center services were outsourced and within a few years upwards of 35,000 cubic feet of non-current material were stored at the vendor's facility and made available to departments by way of standard retrieval procedures.

Since 2003 a succession of grants, totaling nearly \$400,000, from the National Historical Publications and Records Commission funded a series of projects critical to the development of the City Archives program. Collectively, these projects initiated the Division's program documenting significantly historical City records. Beginning with the School Department's desegregation era records this initiative expanded to produce dozens of on-line finding aids. These finding aids document records of colonial Boston and annexed municipalities, the Mayor, Clerk and City Council, the schools, social service institutions, and a variety of other City agencies. They are linked with the online *Guide to the Records in the City of Boston Archives*, also developed in these projects and consisting of scores of department histories and descriptive information on hundreds of City records series.

These projects also introduced records management initiatives extending from the creation of a records management position in the School Department to the development of City-wide policies for records retention and the management of electronic records. They further produced the ongoing collaboration among the Archives, DoIT and Corporation Counsel to develop records management technology and training initiatives for the implementation of policy that will achieve City-wide operational efficiencies and legal compliance.

Recent completion of the City's Archives Center in West Roxbury has created the environmentally controlled space necessary to accommodate permanent records that have accrued over the years in City departments. The most recent grant, awarded in 2011, will enable the Archives to survey archival records across the City, transfer legacy archives to Rivermoor, establish standard procedures for ongoing systematic transfers, and plan for electronic archives preservation and access.

Collectively these projects have provided critical building blocks for the development of the Archives program. They have enabled the Archives to document and make accessible a significant volume of its holdings. They have enabled it to create a framework for the implementation of policy that will achieve City-wide operational efficiencies and legal compliance through the correct management of records. And while executing the work of these projects the Division's archivists also carry on the day-to-day responsibilities for repository management, researcher services, department records management consulting, routine acquisitions, etc. (See descriptions of duties below.) All this can only be accomplished by professionally trained and experienced labor.

The Importance of Professionally Trained Staff in the City Archives

Since 1995 all archivists recruited have been qualified by virtue of their professional education credentials, notably the Masters in Library and Information Science with concentration in archives. Graduates of such programs are uniquely equipped to benefit the City Archives mission for three reasons.

- First, professionally educated archivists bring with them a body of principles or theoretical framework supporting and guiding the actual practice of the profession. The depth and breadth of principles archivists have built into their practice – and are taught in these programs – impact the quality of thought in day-to-day work. Professionally educated archivists will ask why things are done, and not simply how they are done. They will examine critically how and why practice has evolved. Where principles do not apply to practice or require amplification, they will explore the reason. Knowledge of these guiding principles prepares graduate recruits for sound practice and distinguishes university education from an apprenticeship.
- Second, professionally educated archivists are equipped with knowledge of the nature of records, record-keeping and archives. They have acquired a fundamental understanding of basic archival functions, the use of archives, the development of the profession and the world and workings of archivists and archival institutions. And while a comprehensive understanding of this universe only comes with time and experience, the important thing is that they know what they will need to know and how they may learn it.
- Third, the graduate program, through mandatory internships, builds the practical skills that allow recruits to be productive from the very start of their employment. Internships afford practical expertise in how to identify a records series, construct an inventory, and arrange, describe and document a body of archival records.

Basic grounding in the principles of archival science; the exigencies of definition and terminology critical to communication and analysis of archival issues; and the meshing of principle and theory with knowledge and skills, obviate costly, inefficient learning curves, hasten the integration of new employees into the mainstream of the Division's professional tasks and enrich the potential for insights and refinements in its work.

Staff Duties: Archivist/Deputy Archivist

There has never been a chief archivist appointed in accordance with the provisions of the City Archives statute. From 1988 to 1993 the position was anomalously filled and salaried by the BRA, and a contemporary job description has not been located. Since 1995 the Deputy Archivist has assumed the duties and responsibilities of a *de facto* division director and has reported directly to the City Clerk. Thus, the Archivist/Deputy Archivist directs the overall management and programming of the Archives and Records Management Division and executes the responsibilities of chief records officer of the inactive records of the City. He directs the work of the Assistant Archivists and oversees the direction and coordination of all programs, projects, and major activities of the Division including those encompassing core archival activities such as records appraisal, access, and preservation. He supervises the selection of documents for permanent preservation; oversees the development of outreach and training programs for improved records management throughout City departments; initiates programs for the promotion of public interest, education, and scholarly projects centered on the Division's

holdings; presents annual budget estimates to the City Clerk for the operation of the Division; and directs the long-range and strategic planning necessary to development of the Division.

Staff Duties: Assistant Archivists

Currently there are three permanent Assistant Archivists. Two are primarily focused on the management of archival documents and researcher services, while the third focuses primarily on records management. Assistant Archivists are responsible for the following tasks:

Archives Management. Assistant Archivists are responsible for implementing programs for the care and custody of official City of Boston records deemed permanent for historical or legal purposes. They implement and maintain conservation and preservation procedures. They see that professional conservation methodology is employed to save deteriorating historic materials. They develop and maintain archives storage systems. They acquire the City's archival records from departments (or other entities that have served as interim custodians), and incorporate them into the City Archives collections. They document archival records by means of agency histories, descriptions of records series structure and characteristics, and details of series content. They supervise contract workers, interns and volunteers, who assist with the endless work of caring for the City's documentary heritage.

Reference and Public Access. Assistant Archivists are responsible for managing the City Archives reference program and carrying out the City's statutory responsibility to make records in the Archives available to both City departments and the public. To perform these tasks effectively, Assistant Archivists must expeditiously acquire and continuously develop knowledge of the contents of the City Archives in order to meet the needs of persons conducting widely variegated categories of research. These include research requests by the departments or the City Council to determine legal or historical precedent or provide historical background for current City business; property information research for persons requiring information about real estate, zoning and permitting; business ownership research; genealogical research; student record information; biography; building and site history; academic research on local and national history; and other areas of research. Assistant Archivists interpret access and records policies for users. They assist users with research strategy and direct them to other institutions holding material relevant to their research. They retrieve records from storage for researchers (and return them) and manage and monitor the reading room ensuring security for the records. They schedule appointments with visiting researchers, respond to researcher requests submitted via telephone, mail and email and maintain research statistics. In the City Archives, the work of assisting the departments and the public is done with the utmost efficiency, competence, professionalism, speed and courtesy.

Special Projects Supported by Grants. Funded projects involve Assistant Archivists in concentrated work producing results of special value to the City and to the research public. In such projects Assistant Archivists analyze large collections, supervise administrative support workers, ensure the preservation and proper re-housing of records, develop in-house finding aids as well as on-line finding aids in EAD and HTML format. Assistant Archivists perform background historical research to provide work products with balanced and informed historical context. They prepare and deliver presentations at public meetings and professional conferences. They develop content for document exhibits, work with other institutions in collaborative activities and work with the project director in the development of reports.

Records Management. Assistant Archivists focusing on records management are responsible for providing management services associated with the destruction, storage and transfer of official City records. They assist the Archivist in developing and updating the City-wide records retention schedule and policies governing records management and the retention management of records in various media (electronic files, email, social media, etc.). They work with departments in the development of agency-specific file retention plans. They process department requests for records destruction and maintain reports of authorized agency records disposal. They inventory unidentified records and records at un-staffed locations. They advise departments on preparation of records for records center storage or archives transfer. They advise departments on preservation methods for records. They assist departments in system analyses of specialized areas, including filing systems or equipment, filing methods and procedures and records conversion projects such as scanning and microfilming.

Administrative Support. In FY 2000 an administrative support position was created in the Archives to deal with a multitude of semi-professional and administrative support tasks. These included maintaining and reporting office statistics, processing customer fee receipts, answering and directing phone calls, maintaining office filing systems, preparing annual routine bid documents, answering routing reference requests, copying, data input, retrieval and re-shelving of records, and assisting the archivists in a variety of tasks. A hiring freeze in FY 01 blocked the filling of this position (an R13), and by FY 02 it was completely taken away. Assistant Archivists now share these duties. There remains a need for this position, which would enable the Assistant Archivists to concentrate exclusively on their professional duties.

Need for Reclassification

The highly specialized, professional nature of archives and records management justifies reclassification of staff in the Archives and Records Management Division.

The Deputy Archivist is currently classified at the level MM1-8, "Principal Administrative Assistant". Since the Deputy Archivist is de facto division director reporting directly to the Clerk and has assumed the duties of the Archivist, the position should be re-graded accordingly.

The salary range for Federal positions with a comparable level of responsibility is \$89,037-\$115,742 (Senior Records Analyst, GS-421/13):

<http://jobview.usajobs.gov/GetJob.aspx?JobID=101812030&JobTitle=Archives+Specialist&q=&jbf574=NQ00&brd=3876&vw=d&ss=0&sort=rv&FedEmp=N&AVSDM=2011-08-22+00%3a03%3a00>

Assistant Archivists are currently classified at the clerical MM1-4 level - "Administrative Analyst". Consideration of the actual duties of Assistant Archivists in the division shows their responsibilities to be significantly greater than those of clerical administrative analysts and to necessitate professional ability and judgment required of "Principal Administrative Assistants" classified at the MM1-8 level.

The salary range for positions at a comparable Federal level is \$49,581 to \$93,470 (Archives Specialist, GS-1321/12):

<http://jobview.usajobs.gov/GetJob.aspx?JobID=101812080&JobTitle=Archivist&q=&jbf574=NQ00&brd=3876&vw=d&ss=0&sort=rv&jbf573=15510%2c15513%2c15515%2c15523%2c29556%2c45576&AVSDM=2011-08-22+00%3a03%3a00>

SOCIAL MEDIA STANDARDS
SOCIAL MEDIA AND CITY RECORDS
[Draft v3 2011-07-27]

PUBLIC RECORDS IN SOCIAL MEDIA

Determining whether recorded information is a public record does not depend upon the medium conveying the information. As with information in any other medium, determining record status of information in social media depends upon a proper evaluation of information content.

As a general rule City of Boston social media sites are subject to the Massachusetts public records law chapter 7, section 4, clause 26. Any content maintained in a social media format that is related to City business, including a list of subscribers and posted communication, is a public record.

The following non-exhaustive list of questions may help determine whether information in social media constitutes an official City record:

- Does the information uniquely document the actions, decisions and/or business of your responsibility as a City employee?
- Does it contain unique evidence of the agency's policies, business, missions, etc.?
- Is this tool being used in relation to the agency's work?
- Is use of the tool authorized by the agency?
- Is there a business need for the information?

If the answer to any of these questions is yes, then the content is likely to constitute an official City record.

PUBLIC ACCESS

The department maintaining the site is responsible for responding completely and accurately to any public records request on social media. Content relating to City business shall be maintained in an accessible format enabling its production in response to a request. Whenever possible, such sites shall clearly indicate that content posted or submitted for posting is subject to public disclosure. Users shall be notified that public disclosure requests must be directed to the relevant departmental public disclosure officer

RECORDS RETENTION

Chapter 66 of the General Laws and chapter 68 of the acts of 1988 govern the management and retention of the City's official records. To comply with these laws, the City's records management policies and records retention schedule provide requirements and guidelines for managing the life cycle of all City records regardless of medium. To implement the policies and retention schedule, individual departments are responsible for developing procedural plans ("file plans") for the systematic disposition of agency records in accordance with the retention schedule. The laws, policies and retention schedule apply to social media formats and content as they do to other format and content. Any City agency maintaining a social media site shall preserve records on that site for the required retention period on a City server in a format that preserves the integrity of the original record and is easily accessible.

After identifying social media content as official records, the agency must apply a retention period based on its agency file plan or City or State retention schedules, or work with the Archives and Records Management Division to formulate an appropriate retention period. The following records series on the Citywide Record Retention and Disposal Schedule may commonly apply to items posted on social media:

ADM-04 Publications – Department Produced or Sponsored
ADM-05 Public Relations Files -Historically Significant
ADM-09 Correspondence/Subject Files - Historically Significant
ADM-10 Correspondence/Subject Files – Program Administration
ADM-11 Transitory Correspondence
ADM-28 Recordings, Audio and Visual - Other Recordings

If social media records are not adequately covered by these or other records series in the retention schedule, the agency should work with the Archives and Records Management Division to determine an appropriate retention period.

SOCIAL MEDIA RETENTION FLOW CHART

Is the social media information being used for City business?

No – Then it's not a public record

YES - Is content unique?

- No - When information content is duplicated across multiple platforms or elsewhere in an agency record-keeping system, the agency may determine that the duplicate content is non-record. For example if social media platforms are used simply to re-post news or other public affairs communication items that are captured and managed elsewhere, then the social media content may be considered non-record.

Caveat: However, social media platforms may offer better indexing, opportunity for public comment, or other collaboration, adding value to the content and making that content a record. Before applying an existing records series from the schedule, consider whether the use and functionality of the platform affects value of the record. A new retention schedule item should be developed if the tool provides enhanced processes, functionality, added metadata, or other features.

- Yes - After identifying social media content as official and non-transitory records, the agency must apply a retention period based on its agency file plan or City or State retention schedules, or work with the Archives and Records Management Division to formulate an appropriate retention period.

Caveat: Transitory records (COB Retention Schedule ADM-11) include records of short-term interest, which have minimal or no documentary or evidential value. Transitory records may be destroyed immediately, or when no longer needed for reference, or according to a predetermined time period or business rule